

September 21, 2007

Debbie Brookman
Senior Field Representative
Washington Federation of State Employees
1210 Eastside St., Suite 100
Olympia, WA 98501-2443

RE: Rejane Barsness v. Department of Social and Health Services (DSHS)
Allocation Review No. ALLO-06-019

Dear Ms. Brookman:

The Director's review of DSHS's allocation determination of Rejane Barsness' position has been completed. The review was based on written documentation and on information provided during the September 6, 2007 Director's Review meeting. Present at the Director's review meeting were you, Ms. Barsness and Pam Pelton, Classification Manager for DSHS.

Background

Ms. Barsness requested a reallocation of her Administrative Assistant 3 position to the Manager, Office Services 1 classification. By letter dated August 18, 2006, DSHS determined that her position should be reallocated to the Supply Officer 1 classification, effective March 8, 2006. On September 19, 2006, Ms. Barsness requested a Director's review of DSHS's determination.

During the Director's review meeting, we discussed the chronology of events leading to Ms. Barsness reallocation. She initially completed a Department of Personnel Position Review Request form asking for reallocation of her position. (Exhibit E-A). This form is not date stamped as having been received by DSHS's Human Resources office. Ms. Barsness stated that at the request of DSHS, she completed a DSHS General Government Position Review Request form. (Exhibit 2). This form is not date stamped as having been received by DSHS's Human Resources (HR) office. During the review meeting, Ms. Pelton indicated that the Position Description Form signed by Ms. Barsness on February 24, 2006 was the document used to reallocate Ms. Barsness' position. (Exhibit C-1) This form has a hand written notation stating "To Susan 3-8-06" which, according to Ms. Pelton, indicates that the reallocation was sent to DSHS's HR office on March 8, 2006.

Ms. Barsness indicated that prior to receiving DSHS's allocation determination, no one from DSHS's HR office met with her to conduct a desk audit of her position. However, she stated that HR met with her supervisor about the reallocation request. After Ms. Barsness requested a Director's review of DSHS's determination, on October 20, 2006, Ms. Pelton met with her and conducted a desk audit of her position. Ms. Pelton indicated that following the desk audit, she agreed with the earlier determination to reallocate Ms. Barsness' position to Supply Officer 1.

Also during the Director's review meeting, we discussed the exhibits provided by Ms. Barsness. I noted that many of the exhibits are dated after Ms. Barsness' request for reallocation. Ms. Barsness agreed but stated that her duties and responsibilities have not changed and indicated that the exhibits were offered as illustrative of the type of duties and responsibilities she performed during the time period under review.

In order to be reallocated to a position with a higher salary range maximum, an incumbent must perform the higher level duties for six months. (See WAC 357-13-090). Therefore, for purposes of reallocation reviews, we generally consider the duties and responsibilities an incumbent performed during the six months preceding the request for review. You indicated that in accordance with the Collective Bargaining Agreement between Washington Federation of State Employees and DSHS, the duties performed during the twelve months preceding the request for review should be considered. DSHS did not disagree with your statement. In this case, Ms. Barsness signed the Position Description Form on February 24, 2006. (Exhibit C-1). Therefore, this position review is based on the duties and responsibilities performed by Ms. Barsness during the twelve months prior to February 24, 2006.

Ms. Barsness initially requested reallocation of her position to the Manager, Office Services 1 classification. During the Director's review meeting, she asked that I also consider the Supply Officer 2 classification. Consistent with the direction provided by the Personnel Resources Board in Boekhoff v. Bellevue Community College, PRB Case No. R-ALLO-07-002 (2007), I considered all relevant classifications regardless of whether they were requested by the incumbent or considered by the employer. Although DSHS did not address the Supply Officer 2 classification in their allocation determination, this classification is relevant. Therefore, in addition to the Manager, Office Services 1 and Supply Officer 1 classifications, I considered the Supply Officer 2 classification. I recognize that subsequent to Ms. Barsness' reallocation request, these classification titles were revised. However, for purposes of this review, I considered the classifications as they existed at the time of Ms. Barsness' reallocation request.

Summary of Ms. Barsness' Perspective

Ms. Barsness argues that the Supply Officer 2 classification best reflects her level of authority and accountability. She asserts that she has delegated authority to take independent action to initiate purchases and has independent purchasing authority up to \$10,000 and that she has purchasing authority for some items up to \$100,000. She contends that she researches equipment and software sources, processes procurement documents and reconciles purchases for all information technology (IT) equipment, telecommunications equipment and software state wide for Economic Services Administration Headquarters, DSHS regional field offices which includes

approximately 61 Community Service Offices and field offices, the Lacey Government Center building and the Capitol View II building. She explained that the IT purchases she coordinates are highly complex and many involve utilizing uncommon sources such as purchasing items from Pierce County. To process procurement documents, she must coordinate purchases and costs with appropriate DSHS staff and coordinate and track receipt of purchases and reimbursement to the vendor as appropriate. She argues that she applies the appropriate codes for purchases and billing which includes 113 physical location codes. She asserts that she:

- makes decisions using extensive knowledge of procurement and supply practices consistent with state laws, state contracts, OFM guidelines and agency policies,
- has authority to modify purchasing procedures or processes for specialized or unusual acquisitions,
- developed procedures to track fulfillment of vendor/contract purchases and payments and to coordinate purchasing activities internally,
- resolves problems with vendors, charges, and payments,
- is the contact person and coordinator for E-purchasing, and the Washington SmartBuying Partnership, the coordinator for IT Division's telecommunications, and
- is the contact person for security and maintenance for two floors of Capitol View II building.

Summary of DSHS's Reasoning

DSHS argues that Ms. Barsness' position does not fit within the Manager, Office Services 1 classification because she is not responsible for the breadth of services or business management functions envisioned by this classification. Rather DSHS asserts that the majority of Ms. Barsness' duties and responsibilities involve procurement and purchasing for Economic Services Administration's Information Technology Division. During the Director's review, DSHS clarified that Ms. Barsness is not responsible for IT purchases for the agency as a whole. She is responsible for Economic Services Administration only which is one of several administrations within the agency. Respondent argues that even though Ms. Barsness does not report to a higher level supply officer, she does plan, coordinate and perform procurement as described in the definition of the Supply Officer 1 classification. In addition, DSHS asserts that her duties are described by the typical work for this level in that she assists in the coordination/responsibility for maintenance of equipment; receives, examines and determines the need for requisitioned items; and coordinates procurement activities. DSHS contends that Ms. Barsness' position best fits the Supply Officer 1 classification.

Director's Determination

As the Director's designee, I carefully reviewed all of the documentation in the file and the information you, Ms. Barsness and DSHS provided during the Director's review meeting. Based on my review of the documents, the information provided during the Director's review meeting, the available classifications, and my analysis of Ms. Barsness' assigned duties and responsibilities, I conclude that her position is properly allocated to the Supply Officer 1 classification.

Rationale for Determination

In summary, Ms. Barsness' Position Description Form describes the majority of her duties as:

- providing the purchasing function, including researching and processing procurement documents, for IT equipment and software for the Economic Services Administration headquarters and regional field offices
- acting as the designated statewide E-Purchasing Coordinator for Economic Services Administration
- serving as the contact person for Washington SmartBuying Partnership
- serving as the telecommunications coordinator for the IT Division.

The Definition for the Manager, Office Services 1 classification states, in relevant part, "[i]n a large State agency, assists in the general planning, directing, and controlling of office services and business management functions."

Ms. Barsness works in a large agency but she does not exercise the scope or breadth of responsibility and authority addressed by this classification. Rather, her responsibility and scope of authority is limited to the Economic Services Administration. She does not assist in planning, directing and controlling office services and business management functions for the agency. Rather the majority of her work encompasses the procurement of IT equipment and software for the Economic Services Administration. Her position does not fit within the definition of the Manager, Office Services 1 classification.

The distinguishing characteristics for the Manager, Office Services I classification state:

- A. Serves as a principal assistant to a supervisor equivalent to Manager, Office Services 3. In this capacity, incumbents supervise three or more lower level subordinates; and are responsible for two or more office service and business management functions listed in B.

OR

- B. Supervises the office services and business management functions in a medium-sized State agency. Agency-wide responsibilities should include the following functions: purchasing, inventory control and supply, equipment and office space need determination and utilization, mail distribution, forms analysis, printing/reproduction services, and vehicle utilization and travel arrangements. Incumbents must be responsible for at least four of these functions; and provide office support and business management services in an agency with more than two hundred employees.

Ms. Barsness does not function as a principle assistant to a higher level staff person nor is she assigned supervisory responsibility for other staff. Therefore, her position does not meet the first option in the distinguishing characteristics. She does not work in a medium-sized agency, though Economic Services Administration could be considered equivalent of a medium-sized agency. However, she does not have administration-wide responsibility for at least four of the functions

listed in the second option and she does not provide office support or business management services to the Economic Services Administration as a whole. Her position does not fit within the distinguishing characteristics of the Manager, Office Services 1 classification.

The definition for the Supply Officer 2 classification states, “[s]upervises and coordinates activities of procurement, placement, receipt, storage, issue, and transfer of supplies, equipment and property for most complex departmental supply function.” Typically, positions at this level are responsible for all procurement activities for supplies and equipment within a department. The majority of Ms. Barsness’s duties and responsibilities are limited in scope to procurement of IT and telecommunications equipment and software for the Economic Services Administration. She is not responsible for supplies or property and she is not responsible for placement, storage, or transfer of equipment. While some of her procurement duties can be described as complex and requiring a high level of expertise and coordination, her position does not have the scope or the breadth of responsibilities found in the Supply Officer 2 definition.

While not allocation criteria, a review of the typical work statements for this class establishes that positions allocated to the Supply Officer 2 level exercise department-wide authority in areas such as determining availability of funds, approval of requisitions to the State Purchasing Office, calling for bids and awarding contracts, coordinating transfer of surplus supplies and equipment, formulating procurement procedures for a department, evaluating supply and equipment usage data to determine stock levels, maximum authorization and reorder points, coordinating maintenance and master inventory records, and arranging for maintenance contracts and emergency repairs. Ms. Barsness does not exercise authority for the variety of areas encompassed at the Supply Officer 2 level.

The definition for the Supply Officer 1 classification states, in relevant part, “[p]lans, coordinates, or supervises or performs procurement and inventory functions for Department.” Ms. Barsness plans, coordinates, oversees and performs procurement for IT equipment, telecommunications equipment and software for the Economic Services Administration. Her position fits within this definition. Furthermore, her duties and responsibilities are described by the typical work for this class.

Ms. Barsness argues that the Supply Officer 1 level does not address the complexity of the duties and responsibilities or the level of risk associated with her work. Neither the Supply Officer 1 nor 2 speak to these issues. In determining which classification best describes Ms. Barsness’ position, I must consider the specific work, responsibilities and level of authority described in each classification specification and compare that to Ms. Barsness position. While there is no classification that fully encompasses the complexity of her procurement duties, the Supply Officer 1 classification best encompasses the level of her authority and the breadth of her responsibilities. On a best fit basis, her position is properly allocated.

Appeal Rights

WAC 357-49-018 provides that either party may appeal the results of the Director’s review to the Personnel Resources Board by filing written exceptions to the Directors’ determination in accordance with Chapter 357-52 WAC.

WAC 357-52-015 states that an appeal must be received in writing at the office of the Board within thirty (30) calendar days after service of the Directors' determination. The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Sincerely,

Holly Platz
Director's Review Investigator

cc: Rejane Barsness
Pam Pelton, DSHS
Lisa Skriletz, DOP